CAREER ADVANCEMENT TEAM PROCEDURES MANUAL

ADDENDUM 3

Career Advancement Team Mission

The West Central WorkOne Career Advancement Team will provide all customers with the highest quality job search assistance and skills development enabling the customer to receive the best job at the highest wage possible, thus providing employers with highly skilled job candidates.

ADDENDUM 3

Career Advancement Team
Customer Flow Chart

I. REFERRED or SCHEDULED CUSTOMER ARRIVES

II. Initial Interview

A. Review Work registration information
B. VET Services (if applicable)
C. Discuss and Review Services/Products

III. DEVELOP SERVICE STRATEGY/ IEP
A. Identify Customer Needs for services
B. Provide the needed services
C. Record information in TrackOne
D. Additional Assessments
E. Supportive Services
F. Schedule Services

IV. PRODUCT ACTIVITES

A. Schedule Services
B. Record Customer Participation in TrackOne

V. SUPPORT ENTERED EMPLOYMENT
A. Job Referral
B. Job Development
C. Record Service in TrackOne

VI. CUSTOMER CONTINUOUS ENGAGEMENT
A. Two services within 90 days
B. Evaluation of Customer's Progress
C. Customers with Additional Service Needs

VII. ENTERED EMPLOYMENT

Career Advancement Team – Member

Functional Responsibilities

- Conduct one-on-one meeting to determine how the Career Advancement Team can help each customer meet his or her employment goal.

- Assess needs of customers by identifying skills, aptitudes, interests, and supportive service needs. Identify barriers and services to address those barriers.

- Develop Service Strategy/ Individual Employment Plans (if needed) with customers to establish appropriate career goals and detail specific plans for skill development activities and job search strategies. Modifications as needed.

- Refer customers to appropriate employment seeking activities as indicated in their Service Strategy/ Individual Employment Plan, such as in-house workshops, as well as activities with community agencies or training institutions. Assist customers with accessing self-help and informational resources as needed. Maintain a high level of familiarity with the local labor market so services are aligned with employer and labor market needs.

- Make appropriate job referrals and develop job leads based on knowledge of employer requirements. May require close coordination with Business and Employer Services Team.

- Maintain files and computer databases ensuring proper documentation is available to support program eligibility and services received.

- Maintain knowledge of community agencies, programs, and trainings offered. Maintain communication with and refer individuals as appropriate to other community and partner agencies.

- Remain current on Local Market Information (LMI)

- Attend Career Advancement Team meetings, submit required reports, interpret program information, and continually improve policy and procedures.

- Work to meet or exceed WorkOne performance standards and ensure compliance with Federal, State, and WorkOne rules and regulations.

- Support other Teams as needed.

Career Advancement Team Procedure

Overview

I. REFERRED or SCHEDULED CUSTOMER ARRIVES

- The customer may arrive by referral from a member of the Talent Assessment Team (A Talent Team Member may be escorting the customer) or arrive for a scheduled appointment.
- A Career Advancement Team member greets the customer after being notified of the arrival of the customer at WorkOne.

II. INITIAL ASSESMENT/INTERVIEW

- Collect and add any new information about the customer as needed
- Learn why the customer has come to the center
- Review Track One Data and initial assessment test results to gain baseline understanding of customer
- Look for specific skills that the customer may need to be successful in their effort to find work
- Ensure Work Registration and/or assist the customer in improving his/her work registration as appropriate
- Identify veteran customers to ensure that they have knowledge of the benefits available to them.
- The need for WorkOne products and/or activities are discussed and reviewed.

III. DEVELOP SERVICE STRATEGY/IEP (if needed)

- Identify barriers
- Identify customer's need for service
- Address immediate issues and refer to supportive services, re-schedule one-on-one session if needed.
- Provide job referrals, job search advice, job development and resume/interview assistance as indicated.
- Enter TrackOne information once service has been provided.
- Schedule services

IV. WORKONE PRODUCT ACTIVITY

- Identify customer need for service(s) to assist in addressing barriers.
- Schedule the customer through the electronic scheduling system for WorkOne products as identified.
- Enter TrackOne information once the customer has participated in a WorkOne product.
- Products include but are not limited to: Customized Job Fairs, WorkKeys® and Workshops.

V. SUPPORT ENTERED EMPLOYMENT

- Help the customer identify the jobs that match their skills and make the appropriate referrals
- Develop job opportunities with non-BES TEAM employers

VI. CUSTOMER CONTINUOUS ENGAGEMENT

- Review outcomes from all activities
- Update and revise the Service Strategy/IEP (if needed) with necessary additional services
- Continue to review supportive services needs. Provide necessary services or refer to community agencies.
- Ensure two services within 90 days

VII. ENTERED EMPLOYMENT

- If opportunity to record entered employment presents itself, Career Team should record so in TrackOne

Career Advancement Team Process

I. Returning or Scheduled Customer Arrives

- Greet the Customer: When the customer arrives, they are greeted in a professional, timely, and friendly manner.
- Customers may be walked back by a Talent Assessment Team member or they may come into the center for a scheduled appointment.

II. Initial Interview

Overview

The WorkOne system should assist the customer in the most flexible way possible remembering the purpose of the integrated system is that all customers can access all available services and products in the WorkOne system. The WorkOne system will assist a customer identify needs and barriers to employment and career advancement. Each customer is different so the tool(s) used in the WorkOne system will be applied in various ways.

A. Review Work Registration Information

The Career Team Member reviews the customer's registration to ensure that it is properly completed and make minor revisions if needed.

1. If significant adjustments are needed, Career Team Member will schedule a follow-up appointment date or product activity.
2. An appointment card is provided to the customer to remind them of the follow-up appointment or workshop date.

B. Veteran Services (if applicable)

Many veterans will access employment and training services through the WorkOne system, including the full line of job search and job training services that are offered. Additionally, veterans are also entitled to preferences in the job searching and job referral process. To ensure that veterans have access to all needed services and that veteran's preference is applied as required, the following procedures have been put into place.

1. **Identify Veterans:** Most veterans are identified by the Talent Assessment Team during their entry into the WorkOne system. The process for engaging veterans is as follows:

    a. As Veterans come to the Career Advancement Team, they are seen by an available Veteran Representative who provides the full range of services available in the WorkOne Center.
    b. If a Veteran Representative is unavailable, the veteran is seen by the next available Career Advancement Team member. This ensures that veterans receive quick and efficient services and that they can get the service(s) they require during their visit.

2. **Refer Veterans to Veterans Staff as Needed** : As Career Advancement Team members see veterans and provide them with services, some of these veterans may have issues or questions that are specific to veteran's preference, veteran's benefits, or veteran's programs. When this occurs, the Career Advancement Team member arranges for the veteran to meet with a Veteran Representative to address the issue or question.
    a. If a Veteran Representative is available, the veteran is referred for immediate assistance with his or her issues or questions.
    b. If a Veteran Representative is not available, the veteran is scheduled for an appointment with the Veteran Representative using the internal electronic scheduling system. The

veteran is provided with all other services that the Career Advancement Team provides and is given an appointment card as a reminder of the day and time of their return visit.

3. **Record TrackOne Information for Veterans**(See “A” Addendum 3A): When veterans are provided with services, these services and appropriate case notes are reported in the TrackOne system that is dated the same date as the service in TrackOne. Case note for veteran’s services should include the following information:
   a. Describe the service being provided to the veteran (for example, working on a resume, preparing for an interview, or dealing with a VA or GI Bill question); and,
   b. Describe details that show the depth of service being provided to the veteran (for example, jobs/employers to which resumes were mailed, details about the interview preparation activity, or suggestions for addressing the VA or GI Bill questions that were raised).

C. Discuss and Review Services/Products

The Career Advancement Team reviews the customer’s work history and existing skill levels to help guide this discussion, ensuring that any skill issues identified are addressed. The WorkOne system offers a number of workshops and products that many Career Advancement Team customers will need. One of the foundational principles of an integrated system is that all customers can access all available services and products in the WorkOne system. Services and products may include:

- Job search workshops, resume workshops, interview preparation sessions, computer classes, and many other similar activities.
- A wide array of in-house career and skills development activities such as computer training, customer service training, KeyTrain and other basic skills development activities.

III. Develop Service Strategy/IEP (if needed)

Overview

Although customers will have full and complete access to the resources of the Center, there will be customers that need personalized support and attention to ensure their job search success. The Career Advancement Team will work with these customers in a one-on-one setting to review issues specific to each customer.

A. Identify Customer Need for Service(s)

As Career Advancement Team members work with a customer, there will be unique and specific job search issues that must be addressed to ensure their success in the job search effort. These issues will be identified through many sources, including:

- Conversations with the customer about how their job search is progressing;
- A review of the customer’s job search materials (resumes, cover letters, other items);
- A review of how successful the customer has been in getting interviews and opportunities to talk with employers;
- Feedback from the employer services team on how well prepared the customer is for scheduled activities;
- Specific conversations with the customer about workshops they attended and what they have learned and applied from these workshops; and,
- Any other conversation that occurs with a customer where job search insight can be gained.

B. Provide the Needed Services

The goal is to work with the customer to ensure that the specific job search issue has been fully addressed. When applicable and as time permits, the team member may provide assistance with application, resume, and/or interview preparation.

C. Record information into TrackOne (See “B” Addendum 3A)
After the one-on-one job search support is provided to the customer, the Career Advancement Team member enters the customer into the appropriate activity in the TrackOne system and includes a case note.

1. The case note is dated the same as the activity record and includes the following information:
   - The case note should be titled “Service Strategy/Name of the Activity.”
   - Describe the service being provided in the one-on-one session (for example, to work on a customized resume, to prepare for an interview, or to prepare for a job fair); and,
   - The service that are planned for the customer and how these services will help the customer achieve their employment goal.
2. Refer to Skills manual for IEP development if required. To record in TrackOne, see “D” in Addendum 3A.

D. Additional Assessment Activities

- Certain assessments are required for any customer who participates in occupational skills training, on-the-job training or customized training with an employer. See Regional Policy for the required assessments.
- A review of the customer’s financial circumstance (his/her budget) should be considered and discussed to ensure success when the customer is to receive occupational skills training, on-the-job training, customized training, and/or support services.
  - **Record in TrackOne:** When a customer participates in comprehensive assessment activities, this is reported in TrackOne, including appropriate case notes. Describe the assessment activity and any new or critical information resulting from it (See “C” in Addendum 3A).

E. Supportive Services
On occasion, customers need assistance with financial needs to ensure success in their job search process and/or with job retention. To assist in customer’s success, support services are provided to customers who require them, in accordance with the Regional Operator Supportive Service/Participant Payment Policy. Examples of support services would include uniforms or work clothes for a new job, limited child care or transportation assistance. *(See Regional Operator Supportive Services/Participant Payment Policy)*

1. **Identify Customer Need for Support Services**: The Career Advancement Team member identifies specific support service needs that may exist. As part of this discussion, the Career Advancement Team member reviews the following information:
   - Specific support service needs that interferes with the customer’s success in his or her job search or job retention efforts. The specific impact of this issue on the customer’s success is identified through this review.
   - Review other community-based options that may fulfill needs not addressed by WorkOne.
2. **Refer to Community-Based Organizations**: Once a support service need has been identified, the customer is referred to appropriate community based organizations. The Career Advancement Team member moves to the next step in this process by giving the customer specific information on the organization, its location, and the process for accessing the needed support service.

3. **Provide Needed Support Services**: If the needed support service cannot be provided through a community based organization, the Career Advancement Team attempts to provide the service directly to the customer as follows:

    - To provide this service, the Career Advancement Team member completes a purchase order (PO) for the needed service or (if appropriate) issues a gas card or a bus pass to assist the customer with transportation needs.
    - This purchase order must be signed by a Career Advancement Team member who is employed by the service provider (or another representative of the service provider if the Career Advancement Team member is employed by the State of Indiana).
    - The purchase order is written to a specific vendor, for a specific amount, and for a specific item (and quantity if appropriate).

4. **Enter TrackOne Information** (See "B" in Addendum 3A): The Career Advancement Team member enters the service that has been provided to the customer (along with a case note) into TrackOne. The following specific TrackOne entries are made:
    - The Career Advancement Team member records the support services referral and enters a case note.
    - The case note identifies the specific community based organization to which the customer is being referred.
    - The case note reflects the specific support service the customer receives from this community based organization.
    - If the Career Advancement Team member has issued a purchase order and provided the support service directly to the customer, the Career Advancement Team member will record the support service and a case note in the TrackOne.
    - The case note should identify barriers, needs, support service(s), and the community organization(s) contacted who were not able to provide the supportive service.

F. Schedule the Customer for Service(s)

As issues are identified, the Career Advancement Team member will try and address them immediately with the customer. However, if necessary to ensure a quality service, the Career Advancement Team member will schedule the customer in the scheduling system for a one-on-one session to address the specific job search issue. The customer is given an appointment card to remind them of the appointment times.

IV. Product Activities

Overview

WorkOne Products are the backbone of the WorkOne continuous engagement strategy since customers will be provided with many opportunities to participate in these learning activities. Many WorkOne Products are delivered in group training or workshop settings. This includes job search workshops, resume workshops, interview preparation sessions, computer classes, and many other similar activities.

A. Schedule the Customer for Services

As need for a service is identified, the Team member works with the customer to set an appropriate time to begin the activity.

1. If the customer is referred to an in-house training or workshop activity, directly schedule the customer in the activity. Inform the customer of the date and time and give her/him an appointment card if appropriate.

2. If the customer is referred to an activity delivered by an outside vendor, make arrangements for the customer to attend the activity. This includes contacting the vendor directly and scheduling the customer for the planned activity. If needed issue a purchase order (PO) or other acceptable documentation to the vendor to confirm WorkOne's commitment to pay specific costs.

B. Record Customer Participation in TrackOne

1. Once it has been confirmed that the customer has participated in an in-house product, the classroom facilitator enters each customer into the appropriate activity in TrackOne and includes a case note (which is dated the same as the activity record). (See "E" in Addendum 3A)
2. The case note must include the following:
   - The specific workshop in which the customer participated.
   - The content and purpose of the workshop.

3. After each job club session, the job club facilitator will record the appropriate information in TrackOne. To ensure that this happens, the facilitator enters the customer into the appropriate activity in TrackOne and includes a case note (which is dated the same as the activity record) that includes the following information:
   - Job club activity in which the customer has participated;
   - The content of the job club activity.

4. If customer is referred to an outside vendor for training, the service will be entered in TrackOne on the first date the participant is scheduled for the service.

V. Support Entered Employment

A. Job Referral

Customer skills should be matched with skills required for job orders and the job order will specify the steps to apply for the position. Job orders will fall into three categories:

1. Jobs listed by employers currently working with the Business and Employment Services Team (BES Team). Procedures for these jobs will be communicated in the Daily BS. Career Advancement Team customers meeting the requirements can be scheduled or referred as directed in the Daily Business Services (Daily BS) communication.
   a. If the applicants meet all requirements except WorkKeys® assessments, the applicants should be scheduled for WorkKeys®. Contact the REACH Center if no testing sessions are listed for the WorkKeys® assessment.
   b. BES Team employers should NOT be contacted by the Career team member, and referrals should NOT be made directly to these employers.
2. Jobs listed in the WorkOne job matching system by employers **NOT** working with the BES Team.
   a. Potential applicants meeting the requirements should be referred by following the procedures outlined in the job matching system.
3. Jobs found in the job matching system but originally listed by the employer through another system.
   ii. Qualified applicants can be referred to these positions following the procedures outlined, and/or the candidate can make application on his/her own. The BES Team should be advised of these referrals for possible job listings in the future.

B. Job Development

1. When no job orders are found that match the applicant's skills the Career Advancement Team member can contact any employer NOT on the BES Team list to determine if there is a potential job and make a direct referral.
2. When the applicant's skill matches a job listing by a BES Team employer in some but not all requirements, and the Career Advancement Team member believes the applicant could be a good candidate with some additional training, the Career Advancement Team member should contact the BES Team for possible On-the-Job Training opportunity.

C. Record Service in TrackOne

1. When a Career Advancement Team member assists a customer in pursuing appropriate job leads, this service must be entered in TrackOne. The case note will include the following information:
    - The specific employer(s) that were contacted on behalf of the customer.
    - How the employer was contacted
    - Purpose of the contact

VI. Customer Continuous Engagement

Overview

As customers participate in services and activities, progress in attaining skills and employment may be evaluated. As evaluation occurs, a customer may need services to further improve skills and/or enhance his/her employability. Evaluation identifies these additional service needs.

Key issues to be addressed by the Team member includes:

- Does the customer have all of the skills necessary to be successful on the job? If not, what additional services can be provided to develop these skills?
- Does the customer have all of the items (work clothing, for example) that the employer requires on the job? If not, does the customer need assistance in securing these items?
- Does the customer have all of the support systems in place to ensure job retention (child care, transportation, others)? If not, does the customer need assistance in attaining these support systems? (*See Regional Operator Supportive Services/Participant Payment Policy*)

A**. Coordinate with Quality Assurance** Team to re-engage the customer in WorkOne services to ensure that two services in 90 days are met.

B. **Evaluation of Customer's Progress as Needed**: Upon return visits by the customer and at appropriate times during the course of activities, the Team member evaluates the progress of the customer in their skill development and job placement efforts. Key issues that may be addressed in this evaluation would include:

- Was (or is) the customer successful in the activity? For example, did the customer gather the required skills to master a behavioral interview? Or did the customer develop an effective resume that can be customized to different employers?
- Have any barriers been identified that would interfere with the customer's ability to be successful in the activity?
- Is there feedback from the customer or any other source (employers, training providers, and partner organizations) that indicates a need for additional service(s)?
- Has the customer been able to secure employment with the skills they have?

- **Customers with Additional Service Needs**: If, through this ongoing evaluation, a customer is determined to be in need of additional services, the Team member will immediately work with the customer to get them scheduled for the services they require.

Additional services will be entered in TrackOne along with case notes (See “B” in Addendum 3A) that are dated the same day as the service. See section III-A&B for case note documentation

VII. Entered Employment

If customer calls or the opportunity presents itself where a Team Member can obtain entered employment information, that information should be entered into TrackOne.